

92N0090XPE

c. 3

M-202



**Economic Coding**  
**Coordinator Procedures Manual**





#69285  
c.2

**M-202**

**Coordinator Procedures Manual**

Prepared by: Census Operations Division  
Social, Institutions and  
Labour Statistics Field



## TABLE OF CONTENTS

	Page
I. Introduction .....	1
II. Overview of Operation 2 – Economic Coding .....	3
A. Objective .....	3
B. Work Flow .....	3
Sub-operation 2A – Noting .....	3
Sub-operation 2B – General Coding .....	3
Sub-operation 2C – Adjudication .....	3
Sub-operation 2D – Referral Coding .....	4
III. Work Area .....	5
A. Set-up .....	5
B. Work Flow .....	7
C. List of Supplies/Forms/Labels/Manuals/Reference Documents .....	7
IV. General Requirements and Instructions .....	11
A. General Administration .....	11
B. Sub-operation 2A – Noting .....	12
C. Sub-operation 2B – General Coding .....	12
D. Sub-operation 2C – Adjudication .....	12
E. Sub-operation 2D – Referral Coding .....	13
F. Technical Assistance Request Forms (TARFs) .....	13
V. Problem Solving .....	15
A. Sub-operation 2A – Noting .....	15
B. Sub-operation 2C – Adjudication .....	16
C. Sub-operation 2D – Referral Coding .....	18
VI. Overview of Training .....	21
VII. Training Environment and Materials .....	23
VIII. Implementation Techniques .....	25

IX.	Introduction to Training .....	27
X.	Training of Sub-operation 2B – General Coding .....	29
	A. Introduction .....	29
	B. Identification of Whom to Code .....	29
	C. Coding of Industry, Questions 37 and 38 .....	32
	D. Coding of Occupation, Questions 39 and 40 .....	37
	E. Practice Coding of Fictional Respondents .....	41
	F. General Review .....	60
XI.	Training of Sub-operations 2A – Noting and 2C – Adjudication (Quality Control) .....	61
	A. Introduction .....	61
	B. Noter Duties .....	61
	C. Adjudicator Duties .....	63
	D. General Review .....	70
XII.	Training of Sub-operation 2D – Referral Coding .....	71
	A. Introduction .....	71
	B. Referral Coding .....	72
	C. General Review .....	78

## **I. Introduction**

This manual is divided into two main sections. Chapters 2 to 5 deal with general instructions for the coordinator to follow in Operation 2 – Economic Coding. This section also provides general and specific information related to operational functions, such as setting up the work area and actions to be taken when problem cases arise during production.

Chapters 6 to 12 provide coordinators with detailed instructions that will enable them to efficiently conduct the clerical training program. It provides general techniques for training, a list of materials required, training session sequence, time-frames and answer keys to clerical exercises.





## II. Overview of Operation 2 – Economic Coding

### A. Objective

The primary objective of Operation 2 – Economic Coding is to convert the written responses for Questions 37, 38, 39 and 40 into Industry and Occupation codes. The codes assigned are subjected to the "lot acceptance" quality control method. The codes will be obtained from the On-line Reference Manual System (ORMS) which is an electronic version of Industry and Occupation reference material developed for the 1996 Census. The Census Automated Control System (CACS) will be used to perform specific functions related to Quality Control such as sampling and determination of the review status for each EA.

### B. Work Flow

Economic Coding consists of four sub-operations: Noting, General Coding, Adjudication and Referral. Each sub-operation is described below.

#### Sub-operation 2A – Noting

Noting constitutes the first phase of quality control for Economic Coding. At the Receipt and Registration stage in Operation 1, the sample of Form 2B/2C/2D and Form 3 Usual Resident (UR) questionnaires to be noted for each enumeration area (EA) will be selected. In sub-operation 2A, the Noter follows the General Coding procedures to determine the appropriate Industry and Occupation codes and records them on the Noting Form. The completed noting forms are then filed to be used during the adjudication phase.

#### Sub-operation 2B – General Coding

In Economic Coding, written responses are converted into numeric codes for Industry and alphanumeric codes for Occupation. An identification of whether or not to code the respondent is performed. At this stage, special codes are assigned to students/trainees, retired workers, volunteers and full-time homemakers. Codes are obtained from a number of reference manuals, such as the List of Establishments and Industrial Coding Manual for Industry coding and the Occupational Coding Manual for Occupation coding.

#### Sub-operation 2C – Adjudication

Adjudication is the second phase of quality control for Economic Coding. In Adjudication, the coding actions taken by the Noter on the noting forms are compared to the coding actions taken by the General Coder for each sampled questionnaire within the EA box. If the Adjudicator finds discrepancies between the Noter's and the Coder's coding actions, the discrepancies are recorded on the Error Listing Form and the correct coding actions are determined by following the General Coding procedures. An error may be charged to either the Noter or Coder or both. The Adjudicator then counts all the Noter and Coder errors, and enters the total number of codes in the sample and the total number of Noter and Coder

errors for Industry and Occupation into the Census Automated Control System (CACS) and on the Error Listing Form. Based on the total number of codes in the sample and the total coder errors, the CACS will derive a review status of either accepted or rejected.

#### **Sub-operation 2D – Referral Coding**

If during General Coding or Adjudication a particular response cannot be coded using the standard reference manuals, the question is identified on a Referral Form. Once processing of this EA is completed in Adjudication, the EA is sent to Referral Coding. Referral coders attempt to determine the appropriate codes through the use of additional reference material such as telephone books, city directories and school lists. A qualified coding consultant is available to resolve cases that cannot be coded by the Referral Coder.

### III. Work Area

#### A. Set-up

The organization of your assigned working area is your responsibility within the guidelines set by your Document and Verification Processing Manager. You must ensure that the area is kept neat and orderly at all times. Documents may get lost if this is not done.

All coordinators should ensure that space is available for the temporary storage of EA boxes while they are in your sub-operation.

1. Depending on your sub-operation you should allocate space as "On Hold" or "On Hand" for the following types of EAs:
  - EAs to be forwarded to sub-operation 2A – Noting
  - EAs in sub-operation 2A – Noting awaiting coordinator's spot check
  - EAs to be forwarded to sub-operation 2B – General Coding:
    - New Coding
    - Recoding
  - EAs in sub-operation 2B awaiting coordinator's spot check
  - EAs to be forwarded to sub-operation 2C – Adjudication
    - First Review
    - Second Review
    - Third Review - Recoding
  - EAs in sub-operation 2C – Adjudication awaiting coordinator's spot check
  - EAs to be forwarded to sub-operation 2D – Referral Coding
  - EAs in sub-operation 2D – Referral Coding awaiting coordinator's spot check
  - EAs awaiting Coding Consultant's review
  - EAs to be forwarded to Sequencing, Labelling and Batching
  - Problem EAs not already mentioned
2. Sub-operation 2D – Referral Coding also requires space for the storage of and easy access to the following reference materials:
  - City directories
  - Dictionaries – French/English, English/Italian, and single language dictionaries in English and French
  - List of educational institutions (by province)
  - Telephone directories
  - Dun and Bradstreet (Canadian Key Business Directory) (for coding consultants only)

3. Files for blank and completed forms/labels:

Depending on your sub-operation, you will be required to maintain files for various blank and completed forms and documents. Check with your processing manager for information on various ways to file your forms efficiently.

(a) Sub-operation 2A – Noting

- Blank forms
  - Noting Forms
- Completed forms
  - Noting Forms filed by PROV, FED, EA, VN
  - Coordinator's file (miscellaneous documents related to personnel)

(b) Sub-operation 2B – General Coding

- Blank forms/labels
  - Referral Label (R-206)
  - Referral Form (R-217)
- Completed forms
  - Error Listing Form (R-216) (yellow copy received from sub-operation 2C – Adjudication) filed by Coding Clerk number
  - Copy of Referral Form (R-217) (received from sub-operation 2D for over-referral) filed by Coding Clerk number
  - Coordinator's file (miscellaneous documents related to personnel)

(c) Sub-operation 2C – Adjudication

- Blank forms/labels
  - Noting Forms
  - Reject Label (R-205)
  - Referral Label (R-206)
  - Error Listing Form (R-216)
  - Referral Form (R-216)
- Completed forms
  - Noting Form
  - Error Listing Form (R-216)
  - "Cancelled" Referral Form (R-217)
  - Noting Forms, Error Listing Forms and Referral Forms filed by PROV, FED, EA, VN
  - Coordinator's file (miscellaneous documents related to personnel)

## (d) Sub-operation 2D – Referral Coding

- Blank forms
  - Referral Forms (R-217)
- Completed forms
  - Referral Form (R-217) placed in an envelope with the other Economic Coding Forms.
  - Coordinator's file (miscellaneous documents related to personnel)

## 4. Coding Consultant

- Blank Forms
  - Coding Consultant Evaluation Form (R-218) (to be shipped to the Regional Processing (RP) Help Desk on a weekly basis)

**B. Work Flow**

Arrange your area to minimize bottlenecks in the work flow. Your Processing Manager should provide you with some advice in order to achieve a smooth flow of work.

The movement of EA boxes by the Control Clerk to each of the sub-operations is to be channelled through the coordinator in each sub-operation. In this way, the coordinator will remain constantly aware of the production and quality of work within his unit.

**C. List of Supplies/Forms/Labels/Manuals/Reference Documents**

As coordinator you are responsible for distributing materials to your clerks. Below is a list of supplies, forms, labels, and manuals allotted to you for use in processing. Handle these items with care and use only as much as is necessary to avoid waste; ensure your clerks do likewise.

1. Supplies

Note: Supplies which are followed by positions in brackets indicate distribution to only those positions.

**Binders**

Daily diary (Coordinator)  
 Date stamp (Coordinator)  
 Date stamp pad (Coordinator)  
 EA boxes (or other boxes) for filing  
 Envelope for Quality Control Forms and Referral Forms  
 Expansion envelopes (Coordinator)  
 File folders (Coordinator)  
 Pencils, black lead  
 Pencil sharpener  
 Rubber fingers

2. Forms/Labels

- (a) All sub-operations:

Technical Assistance Request Form (TARF)

- (b) Sub-operation 2A – Noting only:

Noting Forms

- (c) Sub-operation 2B – General Coding only:

Referral Label (R-206)

Referral Form (R-217)

- (d) Sub-operation 2C – Adjudication only:

Noting Form

Reject Label (R-205)

Referral Label (R-206)

Error Listing Form (R-216)

Referral Form (R-217)

- (e) Sub-operation 2D – Referral Coding only:

Referral Label (R-206)

- (f) Coding Consultant only:

Coding Consultant Evaluation Forms (R-218)

3. Manuals

- (a) All sub-operations:

Economic Coding Procedures Manual (M-200)

Economic Coding Training Guide (TM-200)

Economic Coding Coordinator Procedures Manual (coordinator only) (M-202)

ORMS User Guide

CACS User Guide

Extracts for Training

- (b) Sub-operation 2A and 2C only:

Economic Coding Quality Control Procedures Manual (M-201)

Economic Coding Quality Control Training Guide (TM-201)

(c) Sub-operation 2D only:

Economic Coding Referral Procedures Manual (M-203)  
Economic Coding Referral Training Guide (TM-203)

4. Reference Documents

(a) All sub-operations:

To code Industry and Occupation responses, all clerks will use the On-line Reference Manual System (ORMS). The ORMS contains the List of Establishments (LOE), the Industrial Coding Manual (ICM) and the Occupational Coding Manual (OCM) in an electronic format.

To assist clerks in familiarizing themselves with the ORMS, an ORMS User Guide will also be available.

To assist clerks in familiarizing themselves with the CACS, a CACS User Guide will be available.

There will also be a limited number of paper copies of the LOE, ICM and OCM available for contingency purposes.

(b) Sub-operation 2D – Referral Coding only:

City directories  
Dictionaries – French/English, English/Italian, and single language dictionaries in English and French  
Lists of educational institutions (by province)  
Telephone directories  
Dictionaries of mining/service industries

(c) Coding Consultants only:

Dun and Bradstreet (Canadian Key Business Directory)





#### IV. General Requirements and Instructions

In coordinating one of the Economic Coding sub-operations, there are several aspects of your task that you should constantly keep in mind.

##### A. General Administration

1. Be sure that clerks understand each of the duties to which they are assigned.
2. Carry out regular and thorough spot checks on the work of your clerks. You may need to refer to the procedures manual for your sub-operation to ensure that all aspects of the work are being performed properly. Take corrective action when necessary.
3. If you have any problems which you find you are unable to handle, consult your processing manager.
4. All coordinators and processing clerks will be assigned a unique 3-digit identification number based on the processing centre.
5. As a coordinator, you must maintain a record of daily activities within your section. A daily diary is therefore necessary, and you must keep it up to date if it is to be useful. You should list day-to-day problems with staff, production and procedures.

When contacting persons for resolutions to problems (e.g., Coding Consultant, processing manager), always record the following information for each problem case:

- PROV/FED/EA/VN
- Household number
- Person number
- Question number
- The person contacted
- Date and time the problem was referred
- Date and time the resolution to a problem was received

All information recorded in your Daily Diary will be invaluable in the debriefing sessions and evaluations at the completion of Regional Processing.

Maintaining accurate records will help you in resolving many processing and coordinating problems.

## **B. Sub-operation 2A – Noting**

Monitor the quality of work produced by each noter by performing spot checks of their work. If a significant number of errors are being made by a noter, take the appropriate action to improve the quality of work (e.g., retraining). Be especially conscious of recurring errors indicating that the clerk has misunderstood a certain procedure. Verify that the Noting Form has been completed properly.

Note: The CACS administration menu is available at all times for monitoring Quality Control.

## **C. Sub-operation 2B – General Coding**

Monitor the quality of work as well as the productivity (number of questionnaires coded per day) within your unit. The level of productivity can be determined by comparing the total number of questionnaires processed on a daily basis by your staff with the daily production standards specified by your processing manager.

An individual assessment of the quality of coding can be determined for each clerk by referring to:

- (i) CACS Administration Menus and CACS reports.
- (ii) The yellow copies of the Error Listing Forms returned from sub-operation 2C – Adjudication. For any rejected EAs, the Error Listing Form will be used by the Coordinator to explain the errors made to the clerk and retrain if necessary.
- (iii) Referral Forms forwarded to you from sub-operation 2D – Referral Coding indicating that a significant number of under- or over-referrals are being made by a clerk.

If a Coder appears to be making a substantial number of errors, investigate the problem and take the appropriate action (e.g., retraining).

Note: The CACS administration menu is available at all times for monitoring Quality Control.

## **D. Sub-operation 2C – Adjudication**

Monitor the quality of work performed by the Adjudicator to ensure the correct action(s) are indicated on the Error Listing Form. Also ensure that the "Total codes in questionnaire" for Industry and Occupation on the Noting Forms are correct. Verify that the Error Listing Form is being completed properly. If the Adjudicator's decisions are inappropriate, take corrective action (e.g., retraining).

Also monitor the number of errors being made by the noters. If a noter appears to be making a substantial number of errors, inform the Noter's coordinator, who will take the appropriate action.

Ensure that a justifiable code is only assigned for cases where more than one code is equally acceptable.

Note: The CACS administration menu is available at all times for monitoring Quality Control.

#### **E. Sub-operation 2D – Referral Coding**

Ensure that your referral clerks are not spending an excessive amount of time on a particular referral. If such is the case, the referral should be brought to the attention of the Coding Consultant for resolution.

If you refer a write-in to the Coding Consultant, keep a record in your Daily Diary of the time and date on which you forwarded the problem questionnaire. Follow up on the questionnaire and record in your Daily Diary the date on which you receive an answer. For referred items which are resolved by the Coding Consultant, ensure that they have entered their initials in the Consultant column on the appropriate line of the Referral Form.

If you notice cases of under- and over-referral when reviewing a Referral Form, have a photocopy of the form sent to the sub-operation 2B – General Coding coordinator whose clerk processed the EA.

#### **F. Technical Assistance Request Forms (TARFs)**

Coordinators, coding consultants and processing managers may find:

- problems with some written manuals
- missing entries in Coding Manuals
- problem cases that they cannot solve through the regular procedures

These cases can be sent through the Regional Processing Help Desk to Statistics Canada for resolution. Each request for aid should be made on a Technical Assistance Request Form (TARF). A control log will be maintained for all TARFs.

In addition to the regular information that would be completed for any TARF required in the Regional Processing operation, there are some additional demands required by TARFs issued for Economic Coding.

##### **1. Industry/Occupation Problem Cases**

Requests for problem code assignments must include all the responses to Questions 37 to 40. Any additional information should also be added (e.g., respondent comments on the questionnaire or at the back of the questionnaire, the choice of codes that you think might be appropriate, etc.).

2. Identification of Whom to Code

These cases can be quite complex. Any responses provided by the respondent to Questions 31 to 47 should be used, as well as respondent comments and any opinion that the requester may have on the problem case.

3. Problems with the Procedures Manuals

The specific conflict/error should be clearly identified. Again, any opinion the requester may have on the problem should be noted.

## V. Problem Solving

### A. Sub-operation 2A – Noting

Situation	Action
1. The Noting Form is lost but the questionnaire that goes with it is present.	<p>Instruct the Adjudicator to perform the following actions:</p> <p>Take a blank Noting Form and write the PROV, FED, EA, VN, household number, questionnaire number, and check the 100% sample box as necessary. Write "Original Noting Form lost" on the top of the new Noting Form.</p>
2. The Noting Form is present but the questionnaire that goes with it is lost.	<p>Instruct the Adjudicator to perform the following actions:</p> <p>Select the questionnaire for which the household number is before or after the household number written on the Noting Form.</p> <p>Repeat the action from situation (1) above but write "Questionnaire Lost" on the top of the original form.</p> <p>Put a large "X" on the original Noting Form and write "Questionnaire Lost" on the original form. Keep the original form and the new form together.</p>
3. Both the Noting Form and the questionnaire are lost.	<p>Instruct the Adjudicator to perform the following actions:</p> <p>Select the Noting Forms whose "questionnaire to be sampled" is before and after the lost Noting Form.</p> <p>By looking at the household numbers on these forms, select a questionnaire whose household number is between the two Noting Forms selected.</p> <p>Repeat the action from situation (1) above but write "Both questionnaire and original Noting Form lost" on the top of the new Noting Form.</p>
4. The PROV, FED, EA, VN, household and questionnaire numbers on the sample questionnaires to be noted differ from the numbers on the corresponding Noting Forms.	<p>Instruct the Adjudicator to perform the following actions:</p> <p>Take the EA box and Noting Forms back to the Operation 1 Coordinator for follow-up.</p>

**B. Sub-operation 2C – Adjudication**

Situation	Action
<p>1. The Noting Form is lost but the questionnaire that goes with it is present.</p>	<p>Instruct the Adjudicator to perform the following actions:</p> <p>Take a blank Noting Form and write the PROV/FED/EA/VN, household number, questionnaire number, and check the 100% sample box as necessary. Write "Original Noting Form lost" on the new Noting Form.</p> <p>Enter the required codes or actions for Questions 38 and 40 on the Noting Form.</p> <p>Note: A complete set of Noting Forms will be numbered from 1 to the Total Number of Forms 2 Sampled or 1 to the Total Number of Forms 3 Sampled. A missing Noting Form will be identified by a gap in one of these series. If such a gap is found, the Noter should refer to the Noting Forms immediately prior to and following the gap and write down the household number and questionnaire number of these two Noting Forms. Locate these two questionnaires among the sorted Forms 2B/2C/2D or Forms 3 in the EA box. Count the number of questionnaires between these two and pull out the middle questionnaire (or either of the middle questionnaires if there happens to be an even number of questionnaires).</p>
<p>2. The Noting Form is present but the questionnaire that goes with it is lost.</p>	<p>Instruct the Adjudicator to perform the following actions:</p> <p>Select a questionnaire whose household number is before or after the household number written on the Noting Form.</p> <p>Repeat the action from situation (1) above but write "Questionnaire Lost" on the original form. Enter the required codes or actions for Questions 38 and 40 on the Noting Form.</p> <p>Put a large "X" on the original Noting Form and write "Questionnaire Lost" on the original form. Keep the original form and the new form together.</p>

**B. Sub-operation 2C – Adjudication, concluded**

Situation	Action
3. Both the Noting Form and the questionnaire are lost.	<p>Instruct the Adjudicator to perform the following actions:</p> <p>Select the Noting Forms whose "questionnaire to be sampled" is before and after the lost Noting Form.</p> <p>By looking at the household numbers on these forms, select a questionnaire whose household number is between the two Noting Forms selected.</p> <p>Repeat the action from situation (1) above but write "Both questionnaire and original Noting Form lost" on the top of the new Noting Form. Enter the required codes or actions for Questions 38 and 40 on the Noting Form.</p>

**C. Sub-operation 2D – Referral Coding**

Situation	Action
<p>1. There is a Referral Label attached to the side of the EA box but the Referral Form (or one of the Referral Forms) is missing.</p>	<p>Check the General Coding and Adjudication areas with the appropriate sub-operation 2B or 2C Coordinator to determine whether the Referral Form might have been misplaced.</p> <p>If the Referral Form cannot be located, give the EA box to a Referral Coder to check that there are codes for all responses which should be coded on each Form 2B/2C/2D or Form 3 questionnaire in the EA.</p> <p>If the Referral Coder encounters any responses to be coded, instruct the Referral Coder to complete a Referral Form, entering the required information in all columns of the Referral Form for each question which requires coding and then code the question.</p>
<p>2. The Coder No., date coded and PROV, FED, EA, VN numbers have not been entered on the Referral Form.</p>	<p>Consult the CACS to determine the correct information to be entered on the Referral Form.</p>
<p>3. The PROV, FED, EA, VN numbers do not correspond with those on the EA box.</p>	<p>Consult the CACS and approach the Coordinator to determine whether these forms are with the appropriate EA box.</p>
<p>4. The Document Type, Household No., Questionnaire No., Person No. and Question No. were not completed by the Coder or by the Adjudicator on the Referral Form.</p>	<p>Consult the coordinator of the General Coder or Adjudicator who referred the box to determine the correct information to be entered on the Referral Form.</p>
<p>5. The referred item cannot be resolved after searching the additional reference material.</p>	<p>Bring these items to the attention of the Coding Consultant who will resolve the problem or will give you directions for resolving the problem.</p>



**D. Sub-operation 2D – Referral Coding, Concluded**

Situation	Action
6. The Referral Coding guidelines and examples do not adequately cover the referred questionnaire or doubt exists as to the proper handling of the referred questionnaire.	Bring these items to the attention of the Coding Consultant who will resolve the problem or will give you directions for resolving the problem.
7. When Questions 37 and 38 are blank and the respondent's name is not found or the respondent's employer is not given.	Bring these items to the attention of the Coding Consultant who will resolve the problem or will give you directions for resolving the problem.
8. The description of industry is in any fashion incomplete or ambiguous for a co-operative.	Bring these items to the attention of the Coding Consultant who will resolve the problem or will give you directions for resolving the problem.
9. The appropriate division in Government Services Industries cannot be determined.	Bring these items to the attention of the Coding Consultant who will resolve the problem or will give you directions for resolving the problem.
10. For incomplete, ambiguous or very general answers to the Industry questions, if it is not possible to assign a residual Industry code either because the division or the major group cannot be identified or a residual code does not exist for the division or major group selected.	Bring these items to the attention of the Coding Consultant who will resolve the problem or will give you directions for resolving the problem.
11. A Referral label has not been affixed to the side of the EA box but there is a Referral Form in the EA box.	Ensure that the Referral Forms do belong to this EA box and if so, affix a Referral label to the side of the EA box.
12. A Referral Label has not been affixed to the side of the EA box and there is no Referral Form in the EA box.	Assume the EA box was forwarded to sub-operation 2D – Referral Coding in error and return it to the Control Area.



## **VI. Overview of Training**

As a processing manager or coordinator, one of your responsibilities will be to conduct a training program for your staff which will enable them to carry out the Regional Processing tasks in an efficient manner. It is extremely important that you do everything possible to ensure that your trainees attain a high degree of knowledge and understanding of their duties in Economic Coding. In doing so, you will be creating a solid framework upon which you and your staff can operate as an effective and efficient team.

Chapters 6 to 12 will provide all trainers in Operation 2 with detailed instructions which will enable them to conduct efficient training programs for clerical staff in Regional Processing.

Chapters 6 to 8 contain guidelines pertaining to effective training techniques. Chapters 9 to 12 contain specific instructions for conducting training sessions for each Economic Coding sub-operation. Included in these instructions are the answer keys for each Economic Coding sub-operation's training exercises.



## **VII. Training Environment and Materials**

In order for a training session to be effective, it is important that you provide your trainees with an environment which is as conducive as possible to receiving and understanding the training material. You can create this environment by applying the following points:

1. Develop a thorough understanding of the subject.
2. Assemble all of the training material and/or equipment for the particular session: manuals, forms, supplies, flip charts, etc.
3. Equip the training area with chairs, tables, spare paper, pens/pencils.
4. Have sufficient lighting in the training area.
5. Ensure that the training area is at a comfortable temperature and free from external distractions.
6. Plan sufficient time for teaching and questions.

The materials required during the training program are:

1. Pencils (black lead) (two per trainee)
2. Name cards
3. Flip chart
4. Flip chart paper
5. Felt marker
6. Economic Coding Procedures Manual (M-200) (one per trainee except control clerks)
7. Economic Coding Training Guide (TM-200) (one per trainee except control clerks)
8. Economic Coding Quality Control Procedures Manual (M-201) (one per sub-operation 2A and sub-operation 2C trainee)
9. Economic Coding Quality Control Training Guide (TM-201) (one per sub-operation 2A and sub-operation 2C trainee)
10. Economic Coding Referral Procedures Manual (M-203) (one per sub-operation 2D trainee)
11. Economic Coding Referral Training Guide (TM-203) (one per sub-operation 2D trainee)
12. ORMS User Guide (1 per clerk)

13. CACS User Guide
14. OCM (shared among clerks)
15. ICM (shared among clerks)
16. Extracts for training (1 per clerk)
17. Computer terminal access to ORMS
18. Computer terminal access to CACS
19. TARFS
20. Forms
  - Form 2B/2C/2D and Form 3 census questionnaires
  - Reject Label (R-205)
  - Referral Label (R-206)
  - Noting Form
  - Error Listing Form (R-216)
  - Referral Form (R-217)
  - Coding Consultant Evaluation Form (R-218)
21. Manuals to be used only by coordinators/processing managers.
  - Economic Coding Coordinator Procedures Manual (M-202)
22. Coordinators and processing managers should also use a mock EA box and labels when illustrating the CACS.

## VIII. Implementation Techniques

The training program has been designed with the intent of minimizing the amount of oral presentation to be given by you in favour of maximizing the degree of self-instruction by the trainee through the use of workbooks and exercises.

Some general instructions that relate to training as a whole rather than to any particular portion of the Regional Processing training programs are detailed below:

1. Be punctual.
2. Introduce yourself at the beginning of the session.
3. Speak clearly.
4. Be enthusiastic, confident and patient.
5. Always ensure that all trainees have fully understood the information they have received before proceeding to the next item of training.
6. During the question/answer periods, direct questions to specific trainees rather than to the class as a whole. Do not name the trainee to whom the question is directed until after the question has been asked.
7. Emphasize to your trainees that they should not be hesitant to speak up if they do not know or do not understand a point. Perhaps the instructions or questions were ambiguous and, therefore, should be clarified.
8. Never be afraid to say "I do not know" when asked a question. You are not expected to remember everything. If you do not know, say so and add: "I will make a note of that and find out for you". Then ask your superior for an answer. If he/she does not know, he/she will find out for you.
9. Let trainees know that you are there to assist them as much as possible; encourage rather than discourage questions.
10. Make sure your trainees take their normal coffee breaks.





## IX. Introduction to Training

You should follow these training instructions very carefully when conducting the Operation 2 training sessions. They are designed, when followed step by step, to make it easier for you to efficiently cover every aspect of the training.

1. Once all trainees have arrived and are seated, introduce yourself and the program.

Example text to be spoken:

Good morning. I will be your instructor while you are learning the job to which you have been assigned as part of the census operations. Before we begin the training, I would like to give you some general administrative information.

2. Give trainees general information concerning:

- (a) starting and finishing times
- (b) coffee breaks and lunch periods
- (c) location of cafeteria, washrooms and telephones
- (d) telephone number for receiving emergency calls
- (e) completion of attendance forms (as applicable)

Note: This information will be supplied to you by your processing manager.

3. Example text to be spoken:

Within Regional Processing there are several different functions which are carried out before data from the census questionnaires can be keyed. One of these functions, and the reason why you have been hired, is Operation 2 – Economic Coding.

Before you begin reading any of the material in front of you, let me first tell you that most of the training is self-instructional in nature. This means that you will learn much of the material by reading your Procedures Manual and then performing exercises in your Training Guide based on the material you have just read. Please take your time when reading the material in order to fully understand the instructions. I will be here at all times in the event you have any problems or questions.

4. Example text to be spoken:

Now that you have been introduced to Regional Processing, I would like to tell you about the operation in which you will be working, Operation 2 – Economic Coding.

Using the flow chart on page 7 of the M-200 as a base, identify and describe the sub-operations which make up Operation 2. To illustrate the work flow in Operation 2, you may wish to use an example of a fictitious EA going through each of the sub-operations and briefly describe how it is processed in each sub-operation.

5. Example text to be spoken:

Each of you has been assigned to one of the following sub-operations within Operation 2: Noting, General Coding, Adjudication or Referral Coding. In order to carry out your duties in any of these sub-operations, you must first be trained in the General Coding activities. If you have been assigned to either of the Quality Control sub-operations (Noting or Adjudication) or the Referral Coding sub-operation, you will receive additional training for those activities later.

## X. Training of Sub-operation 2B – General Coding

### Contents and Time-frames

- A. Introduction – 20 minutes
- B. Identification of Whom to Code – 45 minutes
- C. Coding of Industry Questions 37 and 38 – 120 minutes
- D. Coding of Occupation Questions 39 and 40 – 120 minutes
- E. Practice Coding of Fictional Respondents – 2 1/2 days
- F. General Review – 60 minutes

It should be noted that the time-frames provided for each item include the time required to read the procedures, do the corresponding exercises, correct the exercises and review the procedures for each chapter. For item E, you should allow up to one and three-quarter days to do the exercises and up to three-quarters of a day to correct the exercises and some discussion.

#### A. Introduction

##### 1. Example text to be spoken:

Now, would you please turn to page 1 of the Economic Coding Procedures Manual (M-200) and read the Introduction up to page 8.

Once the trainees have read the Introduction, ensure that they understand the items addressed by giving them examples and allowing for questions and answers. Allow about 10-20 minutes.

Then have them read the Introduction on page 1 of the TM-200, Economic Coding Training Guide.

#### B. Identification of Whom to Code

##### 1. Example text to be spoken:

The first step in General Coding is performed for each respondent on the Form 2B/2C/2D or Form 3 Usual Resident (UR) census questionnaire and is called Identification of Whom to Code. By looking at the responses to the economic questions (Questions 31 to 47) for each respondent, you can determine whether or not Industry and Occupation coding should be performed for the respondent. When performing this step there are five main items which you are looking for:

- (a) respondents who left all of the Industry and Occupation questions blank (non-response to both Industry and Occupation)
- (b) respondents who reported their school or trainee activities as work in Questions 37 to 40

- (c) respondents who have specifically stated that they were retired (or a synonym)
- (d) respondents who report volunteer work or in Questions 37 to 40
- (e) respondents who report housework in Questions 37 to 40

In the case of respondents who did not answer the Industry and Occupation questions, you will simply proceed to the coding of the next person. For respondents who have reported their school or trainee activities as work in Questions 37 to 40, a Referral Form must be completed. In the case of retired workers, special criteria must be followed and different actions are required depending on whether or not the respondent has remained completely retired. For persons who report volunteer work or housework in Questions 37 to 40, specific criteria are also used to determine the correct coding action related to whether or not another job was held by the respondent.

With these points in mind, please turn to page 11 of the M-200 and read Chapter II – Identification of Whom to Code, up to and including page 16. Once you have finished reading the procedures, turn to Chapter II – Identification of Whom to Code on page 3 of the TM-200 and do the exercises on pages 4 to 17, inclusive. (Allow 30 minutes and then review with the Answer Key shown below.)

## 2. Answer Key

1. This respondent has indicated that he/she is retired, and there is no evidence of work between January 1, 1995 and May 14, 1996. Assign code 001 in Q. 38 and leave Q. 40 blank. Proceed to the coding of the next person on the questionnaire.
2. The respondent apparently is retired but has not specifically stated this anywhere. No other special "Whom to Code" situations apply. Proceed to the coding of Industry. A special head office automated edit will detect and correct the labour responses for these persons.
3. Although the respondent has stated that he/she was "retired", responses to Q. 31, 36, 45 and 47 provide evidence of work between January 1, 1995 and May 14, 1996. Coders should consider that this person is not retired. No other special situations apply. This person's Industry and Occupation responses should be coded. Proceed to the coding of Industry.
4. This person has reported housework in Q. 37 to 40; no income is reported in Q. 47 (a), (b) or (c). Assign code 003 in Q. 38 and leave Q. 40 blank. Proceed to the coding of the next person on the questionnaire.
5. Responses to Q. 37 to 40 indicate that the respondent is a full-time homemaker, however, there is income reported in Q. 47 (a), which is

evidence of another job held since January 1, 1995. Assign code 000 in Q. 38 and code X000 in Q. 40. Proceed to the coding of the next person on the questionnaire.

6. None of the five special "Whom to Code" situations apply. This respondent's Industry and Occupation responses must be coded. Proceed to the coding of Industry.
7. None of the five special "Whom to Code" situations apply. This respondent's Industry and Occupation responses must be coded. Proceed to the coding of Industry.

**Note:** Exercises 6 and 7 are examples of "normal" coding situations. "Normal" coding situations will be encountered **most** of the time.

8. Question 37 to 40 are all blank. (This is the first special coding situation in the whom to code edit.) Simply proceed to the coding of the next person on the questionnaire.
9. None of the five special "Whom to Code" situations apply. This respondent's Industry and Occupation responses must be coded. Proceed to the coding of Industry.

**Note:** Exercise 9 is also an example of a "normal" coding situation.

10. This respondent reported school/trainee activities in Q. 37 to 40. A Referral Form must be completed for Q. 38 and Q. 40. Proceed to the coding of the next person on the questionnaire.
11. This respondent reported school/trainee activities in Q. 37 to 40. A Referral Form must be completed for Q. 38 and Q. 40. Proceed to the coding of the next person on the questionnaire.
12. This respondent reported school/trainee activities in Q. 37 to 40. A Referral Form must be completed for Q. 38 and Q. 40. Proceed to the coding of the next person on the questionnaire.
13. Volunteer work was reported by the respondent in Q. 37 to 40 and there is no income in Q. 47 (a), (b) or (c). Assign code 002 in Q. 38 and leave Q. 40 blank. Proceed to the coding of the next person on the questionnaire.
14. Volunteer work was reported by the respondent in Q. 37 to 40 but there is income reported in Q. 47 (a) which is evidence of another job held between January 1, 1995 and May 14, 1996. Assign code 000 in Q. 38 and code X000 in Q. 40. Proceed to the coding of the next person on the questionnaire.

### C. Coding of Industry, Questions 37 and 38

1. Example text to be spoken:

The first questions which you will be coding are Industry Questions 37 and 38. To code these questions you will have an extract of the LOE. The LOE lists the names, addresses and Industry codes of most establishments or firms in Canada.

You will also be using the Industrial Coding Manual (ICM) to code the Industry questions. The ICM lists and classifies all industries into groups. Each group of related or similar industries carries the same Industry code as that shown in the LOE.

Before reading the procedures for Coding of Industry, please:

- Read the Introduction of the Industrial Coding Manual found in Economic Coding – Extracts for Training.
- Review the layout of the ICM, noting where you would find the Introduction, Coding Structure, Analytical Index and Alphabetical Index.
- Read the bold portion of the description for Division I – Wholesale Trade Industries on page 219 of the ICM as well as page 45 in the Economic Coding Extracts.

**Note:** For training purposes the Introduction to the ICM as well as samples of the other portions of the manual and extracts from the Occupational Coding Manual and List Of Establishments have been copied and placed in one manual (Economic Coding - Extracts for Training). Complete copies of the ICM and LOE are available and you should take some time to review the complete versions.

Allow 20 minutes for the trainees to read the text and to become familiar with the reference documents. Answer any questions trainees may have and explain more fully the note in Wholesale Trade. This applies to a number of companies (e.g., retail lumber establishments such as Beaver Lumber or Cashway) which are assigned codes in Wholesale Trade because of the material they sell.

Example text to be spoken:

You should also:

- Check the layout of the LOE
- Read the Introduction up to the point where the topic 'Rules for Sorting Company Names' is discussed.

It is not necessary to read all these rules that are used to find where companies are placed in the LOE, but you should be aware of some of the more common ones that you are likely to use when searching for companies through print copies of the manual. For example, most entries should be searched for in the same way that you search a telephone book (i.e. Jean Roy Inc. would be found in the "R's" under Roy). Another common rule is that many common words such as INC, LTEE, LTD are completely ignored and should not be considered as part of the company name when you are searching through the LOE.

Allow 20 minutes for the trainees to read the Introduction and to become familiar with the format of the LOE.

Example text to be spoken:

One point should be noted regarding the number of titles that are found in the French versions of both the Industry Coding Manual and the Occupational Coding Manual (which you will see later in the training).

There are many more titles in the English versions than there are in the French. This is partly due to the method used by coding experts in Standards Division when they give a ruling on a title which is not in the Coding Manuals. They are often asked by users, both within and outside Statistics Canada, to assign a code to be used for a particular Industry or Occupation title. In these cases, they give their interpretation of the correct code to be assigned. They do not normally translate that title into the other language (either English or French).

Since there are more requests for rulings in English than there are in French, the files of English titles are significantly larger. We have made use of these files to increase the number of titles in the Coding Manuals and ease the work required by coders. However, it will be evident for those coders using both manuals that the English manuals do cover more Industry and Occupation titles.

Now that you are familiar with the format of the reference materials which you will be using to code the Industry question, please do the following:

Turn to page 18 of the M-200 and carefully read the procedures up to and including page 38.

Please keep in mind that while the procedures become increasing complex, there are two main procedures that cover ninety per cent (90%) of industry coding cases.

- In the first instance, the company name is found in the LOE and the coder uses the ICM Analytical Index to confirm that the description of industry given by the respondent is appropriate for the LOE code given.

- In the second instance, no company name is found, so the coder searches for an industry title in the Alphabetical Index of the ICM. When a matching title is found, the code is verified by checking the industry description in the Analytical Index of the ICM.

Allow 1/2 hour (or more, depending on how the trainees seem to be progressing).

Please introduce these points, which are in addition to the procedures the trainees have read.

- There are a number of industries that needn't be searched for in the LOE. For example, 'Federal Government/Provincial Government/Municipal Government' establishments are better addressed by following the procedures outlined for Government-related companies. Searching for these establishments in the LOE would only be useful if you were searching for a very specific entry such as a Commission or Board.
- This also holds true for some other entries that are unlikely to be found in the LOE. For example, although many names of individuals should be checked in the LOE, names of individual farmers given as answers for the questions on 'For whom did you work?' do not need to be verified. During the training exercises, the trainers will give you some feedback as to the types of entries that it would not be useful to search for in the LOE. In the beginning it is best to start off with the approach of searching the LOE for everything (with the exception of the two cases listed above).

At this point, please do the following:

Turn to page 19 of the TM-200 and complete the exercises on pages 19 to 22.

You may wish to code the first example together with the trainees to ensure they get started on the right track. It may also be helpful to take up the answers after the first four exercises to provide a break.

Allow 20 minutes for all the exercises (or more if required), and then review them with the Answer Key.



2. Answer Key

Coding of Industry, Questions 37 and 38.

Answers for training exercises, pages 19-22 of TM-200.

PERSON	INDUSTRY CODE	COMMENTS
1	484	This is an example of government instructions (pages 34 to 38 in the Procedures Manual) – The LOE should not be used in this case until the Government instructions have been followed.
2	969	In the LOE, or standard coding using the ICM. This is a more difficult problem in French, where the company "Salle de quilles Kinsmen" is found only under the term "Kinsmen Bowling Lanes".
3	455	Not in the LOE. The explanation can be given that despite the large size of the LOE (1,200,000 records), there are still entries that are missing (e.g., reported under a different company, missed from Statistics Canada's files). The coding from the ICM follows standard procedures; both "Longshoring" from Question 38 and "Stevedoring" from Question 37 are found under code 455 and the description in the Analytical Index is appropriate. It can also be pointed out how the industry description from Question 37 could have been used and would have been effective even if nothing had been reported in Question 38. This point is not clearly stated in the Procedures Manual.
4	861	Not in the LOE – Standard coding procedures for "Hospitals". Some coders may take the "laboratory" reference in the second part of Question 37 to refer to medical laboratory (code 868). It should be reinforced that this code would be used only for "independent" medical laboratories.

2. Answer Key (Concluded)

PERSON	INDUSTRY CODE	COMMENTS
5	401	In the LOE. Even if not found in the LOE, the code could come from the ICM (since the reference to "townhouses" shows that this is residential construction). This example illustrates the sorting structure of the printed LOE. "Chester Dawe" is found under the "D's" for DAWE and not the "C's" for CHESTER. However, the record shows in the LOE as "Chester Dawe" (i.e. it is not transposed to be "Dawe, Chester"). This won't be a problem in the ORMS system – since you can search for "Chester", "Dawe" or "Chester Dawe".
6	327	In the LOE. This is slightly more difficult in French, since the company name is given as "Marine Atlantique" and is found under "Marine Atlantic".
7	692	Not in the LOE – Example of Direct Sales instructions from pages 31 to 32 in the Procedures Manual.
8	720	In the LOE. This is also an example of the special instructions for entries where the code found in the LOE is 720 (pages 32 and 33 in the Procedures Manual). In the procedures, the occupation needs to be administrative before the code is accepted, and there is a note in this example that the response in Question 39 is "Administrative Officer".

## 3. Example Review text

Conduct a review of the Coding of Industry using the flow chart on page 18 of the M-200 as a base. Emphasize the following points in your review:

- If there is an entry in the "Name of Firm" line in Question 37, and there are no special instructions, start by looking up this entry in the LOE.
- When using the Industrial Coding Manual, you should always verify that they have selected the correct code by looking up the industry title and description in the Analytical Index of the ICM.
- There are several exception situations and/or problem cases when coding Industry and there are specific instructions for each. You should learn to identify these cases. It is essential that you refer directly to your procedures once you realize you have one of the exception cases.

The cases are:

- Babysitters
- Respondents in cooperatives
- Direct selling (including door-to-door sales such as newspaper delivery)
- An industry code of 720 in the LOE
- Respondents working for private households

The 'Coding Structure' in the ICM, which is also contained in the Training Extract, is very useful when you encounter an industry title that seems reasonable, but there just doesn't seem to be any matching item in the Alphabetical Index.

After training, you can keep your copy of the Training Extract and make use of it whenever you need to review Coding Structures, Introductions to the manuals, etc. It may be more useful to review these portions of the text in print form rather than through the On-line Reference Manual System (ORMS).

Allow approximately 10 minutes for the Review.

#### D. Coding of Occupation, Questions 39 and 40

##### 1. Example text to be spoken:

The next questions which you will be coding are Occupation Questions 39 and 40. To code these questions, you will be using the Occupational Coding Manual.

Before reading the procedures for Coding of Occupation, please:

- Read the Introduction to the Occupational Coding Manual found in the Economic Coding - Extracts For Training.
- Review the layout of the OCM, noting where you would find the Introduction, Classification Structure, Occupational Definitions and Classified Index and the Alphabetical Index.

**Note:** For training purposes the Introduction to the OCM as well as samples of the other portions of the manual are included in one document called the Economic Coding - Extracts for Training. Copies of the complete Occupational Coding Manual are available and you should take the time to review the complete version.

Allow 15 minutes for the trainees to read the text and to become familiar with the Occupational Coding Manual.

Example text to be spoken:

Now that you are familiar with the format of the OCM and the basic classification structure of occupations, please do the following:

Turn to page 40 of the M-200 and carefully read the procedures up to and including page 51.

Allow 20 minutes (or more, depending on how the trainees seem to be progressing).

Example text to be spoken:

At this point, turn to page 23 of the TM-200 and complete the exercises on pages 23 to 25.

When doing these exercises, keep the following general steps in mind:

- Determine if the response is one of the special cases; if it is, follow the appropriate special procedures.
- Create an occupation title from the information provided in Questions 39 and 40 along with information from the industry responses.
- Look the title up in the alphabetical index and verify it in the classified index of the OCM.

Allow 30 minutes and then review the Answer Key.

2. Answer Key

Coding of Occupation, Questions 39 and 40.

Answers for training exercises, pages 23-25 of TM-200.

PERSON	OCCUPATION CODE	COMMENTS
1	H712	Follows standard procedures; the title "Bus Driver" is found in the alphabetical index and can be verified in the classified index.
2	D032	Follows standard procedures; the title "Dietitian" is found in the alphabetical index and can be verified in the classified index.
3	G973	The title "Vacuum Cleaner Salesperson, door-to-door" can be found in the alphabetical index and can be verified in the classified index. The information "in home" contained in Question 40 indicates this code, rather than G211 – Retail Salespersons.
4	A353	Follow procedures for the special case "Armed Forces". Code by rank. The title "Captain" is contained in the alphabetical index.
5	C142	Follow standard procedures; the title "Television repairman/woman" is found in the alphabetical index and can be verified in the classified index.
6	D013	Follow standard procedures; the title "Dentist" is found in the alphabetical index, and can be verified in the classified index.
7	Referral	"Owner/Proprietor" is one of the special cases; however, without more information (industry), it is not possible to determine the appropriate management code.
8	E024	Follow procedures for the special case "Member of a religious order". Since the activity reported is religious only, the respondent is coded to the appropriate code within religious occupations. "Minister, religious organization" is a title in the alphabetical index.
9	H211	It is important to find the code which corresponds to the correct "level" of work. The titles "Electrician, foreman/woman" and "Electrician, helper" can be found in the alphabetical index, but neither are appropriate. The title "Construction electrician", which is contained in the alphabetical index, leads to the correct code. Finding a title such as this is easier using the on-line system. This code can also be found by searching the occupation structure.
10	I011	Follow standard procedures; the title "Dairy farmer" is in the alphabetical index, and can be verified in the classified index.

### 3. Example Review of Occupation Coding

Conduct a review of the Coding of Occupation, using the flowchart on page 40 of the M-200 as a base. Emphasize the following points during your review.

#### Example text to be spoken:

- There are several special cases outlined in the general procedures. Learn to identify these cases and refer to the special procedures when coding them.

The cases are:

- Assistant
- Apprentice or Trainee
- Helper
- Labourer
- Owner/Proprietor of own business
- Contractor
- Supervisor/Foreman/Forewoman
- Manager
- Member of the Armed Forces
- Sales Representative/Sales Specialist/Salesperson, Wholesale Trade
- For every title found in the Alphabetical Index of the OCM, the associated code must be verified by checking the occupation description in the Classified Index of the OCM.
- Since the ICM and OCM are similar in format, it is important to make sure that the correct coding manual is being used to code each of these questions.
- If you cannot find an occupation title in the Alphabetical Index, you should try searching through the Classification Structure for a unit group which may contain occupation titles similar to the title being searched.
- Be sure to search for the correct title. Many titles are similar in spelling but completely different in meaning (i.e. Cosmetologist vs Cosmologist).
- Ensure that you enter the code clearly and neatly. Remember, every code will be keyed at a later stage of processing. Keyers will have problems if B's look like 8's, G's look like 6's, etc.

Allow approximately 10 minutes for the Review.

## E. Practice Coding of Fictional Respondents

### 1. Example text to be spoken:

In order to prepare you for the coding of actual census questionnaires, a series of practical coding exercises have been developed involving fictional respondents. For each of these respondents, their responses to Questions 37, 38, 39, 40, 41, 42 and 43 are shown as they would appear on the census questionnaire.

For 10 respondents, you will code Questions 38 and 40 using your Economic Coding Procedure Manual (M-200), the LOE extract, the Industrial Coding Manual and the Occupational Coding Manual. The following points should be kept in mind when doing these exercises:

- Identification of whom to code is not required for these fictional respondents since it is assumed that they have all worked at some time since January 1, 1995.
- For the coding of each fictional respondent, always refer to your Economic Coding Procedure Manual (M-200). If you attempt to memorize the procedures, you could quite possibly end up with the wrong code or action to be taken.
- If you think that a question should be referred, indicate this by putting an "R" below the question in the TM-200. During actual production, you would not put an "R" on the questionnaire – you would complete an Economic Coding Referral Form.
- Remember that all coding is to be done in black lead pencil. Now, please turn to page 27 of the TM-200 and complete the exercises on pages 28 to 37.

Allow up to 1/2 day for this exercise. It is preferable to stop for corrections after all trainees have completed the first two or three examples, to ensure they are on the right track. In this exercise and subsequent ones, stopping for corrections after approximately every five examples seems to help in reinforcing the coding procedures required.

2. Answer Key

For Training Exercises 1 to 10 on pages 28 to 37 in the TM-200.

RESPONDENT	CODE ASSIGNMENT	COMMENTS
1	Industry – 397	Industry is in the LOE.
1	Occupation – A391	There is not enough information in Questions 39 and 40 alone to code; however, it is possible to create an occupation title using information from Question 38, i.e. the respondent's industry is manufacturing. The title "Manufacturing manager" is in the alphabetical index.
2	Industry – 851	Industry – not in the LOE, but standard coding.
2	Occupation – E035	Follow standard procedures; the title "Policy advisor, education" is found in the alphabetical index and can be verified in the classified index.
3	Industry – 775	Industry in the LOE. This is a multiple LOE entry, where the exact address match should be selected (as outlined in the Procedures Manual – page 25).
3	Occupation – C141	When coding manually (without the ORMS), there are no titles which begin with "Technician". It is necessary to think of a qualifying word to precede "Technician". Words such as "electrical", "electronic" and "design" will lead to titles found in the alphabetical index.
4	Industry – Referral	Referral is not difficult.
4	Occupation – Referral	There is insufficient information to code.
5	Industry – 659	Industry in the LOE: standard coding.



2. Answer Key (Continued)

RESPONDENT	CODE ASSIGNMENT	COMMENTS
5	Occupation – G011	Follow procedures for the special case "Managers". There is a statement on page 50 of the M-200 which says that "Managing staff" is not usually a management duty. If no other management duties are reported by the respondent, then the response should be coded as a supervisor. The title "Supervisor, retail sales" is in the alphabetical index. Note that the industry code of 659 confirms that this is a retail establishment.
6	Industry – 284	Industry is not in the LOE. The code of 284 is based partly on the occupation, which implies both printing and publishing.
6	Occupation – F123, B523 or refer	This is a difficult case. The title "Newspaper page assembler" code B523, is in the alphabetical index. This is a possible code, however, the respondent makes no mention of computers, electronic publishing or word processing equipment. The exclusions to B523 say that "Copy Stylists are coded to 'Graphic Arts Technicians' – Code F123. The main tasks of this occupation fit well with the information provided, i.e. "Prepare initial layout of pages for newspaper edition". If the coder cannot decide between these two possible codes, he/she may choose to refer this case. Note: The code F141, "Graphic Designers and Illustrating Artists", is not appropriate since persons in this group create the artwork rather than just lay it out.
7	Industry – 426	Industry is in the LOE. If not found, the code could be assigned from a combination of the kind of business (electrical) and the Occupation (contracting).

2. Answer Key (Concluded)

RESPONDENT	CODE ASSIGNMENT	COMMENTS
7	Occupation – H012	Follow the procedures for the special case "Contractors". "Electrical Contractor" is a title in the alphabetical index.
8	Industry – 911	Industry is in the LOE. This code should be accepted as explained in the special rules for CO-OPS on page 31 of the Procedures Manual.
8	Occupation – G211	Industry is coded to hotels, motels and tourist courts, which doesn't match well with the occupation information. Perhaps this person is working in a gift shop or small convenience store. The task of preparing sales transactions and accepting cash or credit card payment are included in a sales clerk's main tasks. Coders may also choose "G311 – Cashier" for occupation. Both are acceptable.
9	Industry – 771	Industry uses the rules for "personnel suppliers" when two or more firm names are given (page 20 in the Procedures Manual). It may need to be emphasized that these rules are in the form of a priority (i.e. as soon as one applies, you don't need to look further). Personnel Pool is in the LOE, but not the other industry.
9	Industry – G981	Follow procedures for the special case "Helper". In this case, an appropriate title, "Dry cleaner helper", is found in the alphabetical index.
10	Industry – 861	Industry is found in the LOE. In any case, it follows standard coding procedures.
10	Occupation – E021	Occupation should be coded to "Psychologists". The title "Internist" in the alphabetical index refers only to physicians.

### 3. Example text to be spoken:

We will now continue with a further sample of 55 practical coding exercises involving fictional respondents. For each of these respondents, their responses to Questions 37, 38, 39, 40, 41, 42 and 43 are shown as they would appear on the census questionnaire.

For these respondents, you will code Questions 38 and 40 using your Economic Coding Procedure Manual (M-200) and the LOE, ICM and OCM reference files as they are stored on the On-line Reference Manual System (ORMS).

The same points noted for the earlier coding of the 10 fictional respondents should be kept in mind when doing these exercises:

- Identification of whom to code is not required for these fictional respondents since it is assumed that they have all worked at some time since January 1, 1995.
- For the coding of each fictional respondent, always refer to your Economic Coding Procedure Manual (M-200). If you attempt to memorize the procedures, you could quite possibly end up with the wrong code or action to be taken.
- If you think that a question should be referred, indicate this by putting an "R" below the question in the TM-200. During actual production, you would not put an "R" on the questionnaire – you would complete an Economic Coding Referral Form.
- Remember that all coding is to be done in black lead pencil. Now, please turn to page 39 of the TM-200 and complete the exercises on pages 40 to 94.

Allow up to 1-and-1/4 days for this exercise and the correction. As noted previously, stopping for corrections after approximately every five examples should help in reinforcing the coding procedures required.

4. Answer Key

Answer Key for Training Exercises 1 to 55 on pages 40 to 94.

Person	Assigned Code	Comments
1	Industry – 601	Industry is not in the LOE.
1	Occupation – G211	Follow standard procedures; the title "Bakery sales clerk" is in the alphabetical index.
2	Industry – 051	Industry is in the LOE.
2	Occupation – C123	Follow procedures for the special case "Assistants". The instructions indicate to code to the appropriate technician occupation. The title "forest technician" is in the alphabetical index.
3	Industry – 974	Industry illustrates one of the special rules in the Procedures Manual (page 33 "Private Households"). It is not necessary to search the individual's name in this case, but this may be helpful in other cases where the respondent is in a distinct business.
3	Occupation – G931	Follow standard procedures; the title "house cleaner" is in the alphabetical index.
4	Industry – 866	The reference to private practice gives the preferred 866 code. Coders may suggest the Industry code 399 ("MFG. Dentures") or even Referral. As opposed to the last example, this is a case where looking up the individual's name might have been helpful. In this case, there were two references to "James Hamilton"; neither are appropriate.
4	Occupation – D221	Follow standard procedures; the title "Denturist" is in the alphabetical index.
5	Industry – Referral	Industry is a Referral – The type of structure constructed is not identified.
5	Occupation – H131	Follow procedures for the special case "Labourer". The instructions indicate to code to the more specific information. The title "Brick layer" is in the alphabetical index.

4. Answer Key (Continued)

Person	Assigned Code	Comments
6	Industry – 974	Industry follows one of the special rules in the Procedures Manual (page 31, "Babysitting"). It is not necessary to refer to the LOE in this case.
6	Occupation – G814	Follow standard procedures; the title "Babysitter" is in the alphabetical index.
7	Industry – 295	Industry is in the LOE. There is also a 304 code in the LOE for specific aluminum products, but the 295 code is closer to the kind of business description given by this respondent. Because of the conflict, a Referral is possible. The 295 code is to be added to the ORMS system after the first training sessions; coders using print copies of the LOE will get only code 304.
7	Occupation – A013	Follow procedures for the special case "Managers". The title "President" (a senior management job title) is found in the alphabetical index.
8	Industry – 999	The industry matches to "Artist (exc. commercial), self-employed" from page 321 of the Analytical Index of the ICM. Some coders may choose code 356 because of the reference to "Glass blowing" in the Occupation. This would be a possibility, except for the two references to "artist" in the responses. These cases can be difficult when it's not clear if the person is manufacturing or creating "artistic" products. When less specific terms are given, it might be better to refer. A referral coder might start by looking up the individual's name (as given in the questionnaire) in the LOE. Many individuals with small businesses are in the LOE.
8	Occupation – F144	Follow standard procedures; the title "glass blower" is in the alphabetical index. Coders should not choose "J123 - Glass Forming and Finishing Machine Operators and Glass Cutters". The references to "Artist" in the response make this an inappropriate code.
9	Industry – 376	Industry is found in LOE and follows standard coding procedures.

4. Answer Key (Continued)

Person	Assigned Code	Comments
9	Occupation – J131	Follow standard procedures; the title "Compounder, chemical processing" is in the alphabetical index.
10	Industry – 391	Although the company name is clearly given, it is not in the LOE. The ICM Alphabetical Index search can start with references to 'clocks'. The ICM definitions for code 391 show that this is the correct code. This response in French is more difficult, since the term 'horodactrices' used in the kind of business description is not common.
10	Occupation – J228	Follow standard procedures; the title "Clock and watch assembler" is in the alphabetical index.
11	Industry – 700	The LOE won't always be useful for banks. Some are there, but some are not. The LOE and the ICM Alphabetical Index would be used for any 'bank' entry that is out of the ordinary (i.e. those mentioning mortgage funds, mutual funds, investing groups). The 700 code is sufficient for the general entry 'bank', with no qualification.
11	Occupation – B533	Follow standard procedures; the title "Bank teller" is in the alphabetical index.
12	Industry – 830	This response should be coded using Government rules from the Procedures Manual (i.e. the specific reference for this entry is the second row on page 35).
12	Occupation – C164	Follow standard procedures; the title "Building inspector" is in the alphabetical index. The exclusion under C164 indicates that municipal by-law enforcers at construction sites are coded to G623. These persons would enforce by-laws such as noise restrictions. This exclusion does not apply in this case.

4. Answer Key (Continued)

Person	Assigned Code	Comments
13	Industry – 273	Industry is found in the LOE with multiple entries. The direct address match (top of page 25 in the Procedures Manual) confirms the 273 code. Without the direct address match, the code assigned might be 592, from the item "paperboard and paperboard products, wholesale" in the ICM.
13	Occupation – G111	Follow procedures for the special case "Sales representatives, wholesale." Since paper products are non-technical, G111 is the appropriate code.
14	Industry – 452	Industry follows Government instructions. The specific reference is page 36 in the procedures, with the code confirmed as outlined on page 35 (row one).
14	Occupation – C162	Follow standard procedures; the title "Airworthiness Inspector, government" is in the alphabetical index. Aircraft Inspectors coded to H415 are not enforcing government standards.
15	Industry – 308	The place of work address (Richmond, B.C.) may not have been updated in every training manual. If it is, the code is found in the LOE; if not, standard coding from the ICM should give the same code.
15	Occupation – H311	Occupation is very difficult; industry must be used, along with main task description; J191 is also a possible code.
16	Industry – 258	Industry is in the LOE if done through ORMS, but is not in the Extracts given in training. In either case, the coding should not be difficult.
16	Occupation – J224	Follow standard procedures; the title "Wood finisher, furniture finishing" is in the alphabetical index.

4. Answer Key (Continued)

Person	Assigned Code	Comments
17	Industry – Referral	Industry is a Referral because the textiles are not specified, no specific address is given, and the “Any Street, Any Address” entry is not as close a match as the 182 code with the specific address in Long Sault. The 182 code is probably the best code and could be considered “justifiable”. The reason for the Referral is the possibility of further research resolving the problem (e.g., the Referral coder could check if the respondent’s place of residence was near Long Sault; they could also check telephone books and city directories). Strict step-by-step following of the procedures might give code 182. It is not an easy case.
17	Occupation – Referral	Follow procedures for special case - Foreman/woman; however, the industry must be known in order to code occupation. If the industry referral becomes 182 (textiles), then the occupation code J016 is appropriate. If the industry is coded to a clothing industry, then J025 is appropriate.
18	Industry – 491	Industry is in the LOE with multiple listings. The 491 code is preferable; the 412 code would refer to “construction” of hydroelectric lines, not repair.
18	Occupation – H214	Follow standard procedures; the title “cable repairer, electric power system” is in the alphabetical index. Coders must use industry to ensure they have the correct cable repair code.
19	Industry – 776	Industry is standard ICM coding, not in the LOE. This is a case where looking up the name in the LOE might be helpful if less information were given.
19	Occupation – E012	Follow standard procedures; the title “lawyer” is in the alphabetical index.



4. Answer Key (Continued)

Person	Assigned Code	Comments
20	Industry – 751	This response is not found in the LOE and is difficult to code (particularly in French). It may best be approached from the Industry structure, as noted on page 29 of the Procedures Manual. When the code name in the structure is found (i.e. "751 - Operators of Buildings and Dwellings"), it should seem reasonable.
20	Occupation – B314	Follow procedures for the special case "Managers". The instructions indicate that some occupation titles that contain the word "manager" should not be coded to a management category. "Property manager" is included in this list.
21	Industry – 459	Industry follows Government procedures. The 459 code reference is found on page 37 in the Procedures Manual, with the code confirmed as outlined on page 35 (row one). Don't use the LOE.
21	Occupation – C164	Follow standard procedures; the title "highway construction inspector" is in the alphabetical index and can be verified in the classified index.
22	Industry – 830	Industry follows Government procedures. Since no specific code reference is found on page 38 in the list of municipal government codes, the instructions on the second row of page 35 should be followed. Don't use the LOE.
22	Occupation – C031	Follow the procedures for the special case "Managers." Project management is not a management duty, therefore the respondent is coded as a civil engineer. The title is in the alphabetical index.
23	Industry – 864	Industry is found in the LOE - standard coding.
23	Occupation – E022	Follow standard procedures; the title "social worker" is in the alphabetical index. The duties can be verified using the description in the classified index.

4. Answer Key (Continued)

Person	Assigned Code	Comments
24	Industry - 422	Industry is not in the LOE. This is the type of entry that should not usually be looked for in the LOE. "House Framing" is an exact title match for code 422. The French entry is more difficult (probably a Referral), since the type of carpentry is not specified and codes 422 and 427 are both carpentry codes (one for rough work and one for finished work).
24	Occupation - H121	Follow standard procedures; the title "carpenter" is in the alphabetical index.
25	Industry - 294	Industry is in the LOE, with the code confirmed in the ICM from the kind of business description.
25	Occupation - J122	The coders must use industry when creating an occupation title to search. While there is no exact title match, the titles "Machine mouldmaker, foundry" or "iron moulder, foundry" will lead them to the correct code.
26	Industry - 354	Industry is in the LOE, with the code confirmed in the ICM from the kind of business description.
26	Occupation - J124	The coders must use industry when creating an occupation title to search. The title "Machine operator, concrete products" is in the alphabetical index.
27	Industry - 999	Industry is not in the LOE, but there is an exact title match for "Humane Society" in the ICM.
27	Occupation - G923	Coders may have difficulty coming up with a title; however, if they look under "animal" they will find the title "animal care worker, except farm" which is compatible with the description given by the respondent.
28	Industry - 101	Industry is in the LOE with multiple entries. The first entry is 101 - which is confirmed by reference to the kind of business description.

4. Answer Key (Continued)

Person	Assigned Code	Comments
28	Occupation – J172	Follow procedures for the special case "apprentices"; apprentices are coded to the occupation for which they are being trained. The title "Butcher apprentice, except industrial" is in the alphabetical index; however, coders should realize from Question 38 that the respondent is an industrial butcher. "Industrial butcher" is a title in the alphabetical index.
29	Industry – 521	Industry is in the LOE with multiple entries. The entry 521 is a reasonable code with a direct address match.
29	Occupation – H812	Follow standard procedures; the title "truck unloader" is in the alphabetical index.
30	Industry – 830	Industry follows Government procedures. Since no specific code reference is found on page 38 in the list of municipal government codes, the instructions on the second row of page 35 should be followed. Don't use the LOE.
30	Occupation – B313	Follow procedures for the special case "Assistant". In this case, an appropriate assistant title, "assistant personnel officer", is found in the alphabetical index.
31	Industry – 700	As stated earlier, the LOE won't always be useful for banks. Some are there, but some are not. The LOE and the ICM Alphabetical Index would be used for any 'bank' entry that is out of the ordinary (i.e. those mentioning mortgage funds, mutual funds, investing groups). The 700 code is sufficient for the general entry 'bank', with no qualification.
31	Occupation – B534	Follow standard procedures; the title "bank clerk" is in the alphabetical index.
32	Industry – 599	Industry is not in the LOE. "Importers, not otherwise reported" is code 599. If you look at this in a different fashion, this could have been a Referral (i.e. the product was not specified, so a Referral coder might assign a code with further research). Either approach would be "justifiable".

4. Answer Key (Continued)

Person	Assigned Code	Comments
32	Occupation – G111	The title "importer" is in the alphabetical index. All importer/exporters are coded here regardless of whether the goods they import/export are technical in nature.
33	Industry – 171	Industry - the coder has to translate the response "makes shoes" into an industry, "footwear manufacturing". The 171 code is used rather than a Referral because, unlike Occupation, all kinds of shoes are found under this code (i.e. rubber, composite, leather, plastic). There doesn't seem to be anything missing.
33	Occupation – Referral	Occupation is difficult because we don't know what the shoes are made of, i.e. leather or rubber. Possible codes are J162 and J133. The material of the shoe determines the code.
34	Industry – 811	Industry follows Government procedures. Since no specific code reference is found on page 36 in the list of federal government codes, the instructions on the second row of page 35 should be followed. Don't use the LOE.
34	Occupation – G624	Follow procedures for the special case "Armed Forces members". Although the rank is not provided, the title "Radio operator, armed forces" is in the alphabetical index.
35	Industry – 861	Industry follows Government procedures. Since there was a specific code reference found on page 36 in the list of federal government codes for hospitals (i.e. fourth row), this code reference should be confirmed in the ICM and used as specified on page 35 (row one). Don't use the LOE.
35	Occupation – A353	Follow procedures for the special case "Armed Forces members." Respondent is coded by rank; physician is ignored.
36	Industry – 999	Industry isn't in the LOE, but can be found under the title "writers, freelance" in the ICM.
36	Occupation – F021	Follow standard procedures; the title "freelance writer" is in the alphabetical index.

4. Answer Key (Continued)

Person	Assigned Code	Comments
37	Industry – 579	Industry is in the LOE. Code is confirmed with the title "duplicating machines, wholesale" found in the ICM Analytical Index under code 579.
37	Occupation – C142	Follow the standard procedures; the title "photocopy repairer" is in the alphabetical index.
38	Industry – 104	Industry is not in the LOE. There is a title "cheese manufacturing" in the ICM under the code 104. Reference to the Occupation special rules (page 51 in the Procedures Manual) explains why code 981 - "Religious Organizations" is not an acceptable code.
38	Occupation – J171	Follow procedures for the special case "Members of a religious order". In this case the activity is non-religious; therefore, J171 is the appropriate code.
39	Industry – O11	For Industry, don't use the LOE for entries like "farm" unless the case involves a special service (e.g., fish farming, crop dusting). All "regular" farms are O11.
39	Occupation – I011	Follow procedures for the special case "Managers". "Farm manager" is a title in the alphabetical index.
40	Industry – Referral	Industry is a Referral, since there is not enough information to apply the Government special rules (i.e. we do not know if this person is in an administrative position within the federal government or if this is one of the specified cases with different codes).
40	Occupation – Referral	There is not enough information to code this response.
41	Industry – 635	This company is in the LOE, but this is an example of a case that stretches the limits of the ORMS system. Because "D" and "S" are such common words in the LOE, the ORMS system doesn't have enough memory to complete this search. Standard coding from the ICM gives the same 635 code as a result.

4. Answer Key (Continued)

Person	Assigned Code	Comments
41	Occupation – Referral, B111, B531, B532	This could be a referral as more than one occupation group could apply. Bookkeepers are in B111, Payroll clerks are in B532, Accounting clerks are in B531. All three codes are justifiable.
42	Industry – 775	Industry is not in the LOE. This case could be a referral if the coder thinks it's possible that it's a medical laboratory, since there is an exclusion in the title listed in the ICM (i.e. "chemical laboratory (exc. medical)"). The code 775 is preferable since there is no indication in any of the five responses in Questions 37 and 38 that this is medical.
42	Occupation - C111	Follow procedures for the special case "Assistants". This is an example of assistants in science occupations. The respondent is coded to the technician group according to the kind of work performed.
43	Industry – 641	Industry is in the LOE - standard coding.
43	Occupation A211	Follow procedures for the special case "managers". The title "Retail Sales Manager" is in the alphabetical index. Coders should not choose A131 as Sales managers in retail trade are excluded from this group.
44	Industry – 399	Industry code is in manufacturing. The other possibility is a Referral if the coder thinks it is not clear if the respondent is manufacturing or installing flooring (code 427). Code 399 is preferable.
44	Occupation – Referral	All the titles which include the word "linoleum" relate to the laying of flooring, not inspecting. There are no titles in the alphabetical index which would lead to the appropriate group.
45	Industry – 692	Industry is in the LOE but should not be searched for. This is part of the door-to-door sales special rules (pages 31-32 in the Procedures Manual).

4. Answer Key (Continued)

Person	Assigned Code	Comments
45	Occupation – G973	Once industry is coded, the coder knows that Electrolux is a direct distributor. The title "vacuum cleaner salesperson, door-to-door" is in the alphabetical index.
46	Industry – 853	Industry is in the LOE. If not found, the code should be assigned from the kind of business description taken from Question 37.
46	Occupation – H221	Follow standard procedures; the title "stationary engineer" is in the alphabetical index.
47	Industry – Referral	Industry is a Referral because it is not clear where the babysitting is being done - in the babysitter's home or in the other person's home. This information is required in the special rules for babysitting (page 31 in the Procedures Manual).
47	Occupation – G814	Follow standard procedures; the title "babysitter" is in the alphabetical index.
48	Industry – 776	Industry is in the LOE. This is a case where searching for the individual's name is useful. This entry couldn't be correctly coded without the LOE entry.
48	Occupation – B212	Once the industry is coded, the coder knows that this person is working in a law office. The title "legal secretary" is in the alphabetical index.
49	Industry – 921	Industry is difficult. The university is in the LOE, but it is preferable to code to the cafeteria. Almost all cafeterias in public buildings (e.g., federal buildings, universities) are run by food service companies. You might use the university code if it was clear that this cafeteria was completely run by the institution (e.g., a write-in of "Accommodation Services" in the branch or division line in Question 37).

4. Answer Key (Concluded)

Person	Assigned Code	Comments
49	Occupation – Referral	This response could be referred for two reasons. First, it is an example of a student referral (it should not have been included in these exercises). Second, the description of main duties is vague; more than one code could apply. If the coder does code this response, G961 and G962 are equally acceptable.
50	Industry – 830	Indian Bands fall under Government procedures (page 34 in the Procedures Manual). Since no specific code reference is found on page 38 in the list of municipal government codes, the instructions on the second row of page 35 should be followed. The Chisasabi band is found in the LOE, but it is not necessary to search for it.
50	Occupation – A012	Follow standard procedures; the title "band administrator" is in the alphabetical index.
51	Industry – 103	Industry is in the LOE. There are multiple listings, but the 103 code is the most appropriate for the kind of business description given.
51	Occupation – J171	Follow standard procedures; the title "blender operator, food and beverage processing" is in the alphabetical index.
52	Industry – 820	Industry follows Government procedures for jails (page 34 in the Procedures Manual). In many provinces (e.g., Ontario, British Columbia) the word "Ministry" is a mark of the provincial government, which leads to the assignment of the 820 code. If coders are not aware of this, or if it is not the case in the province where they are doing training, a Referral is acceptable.
52	Occupation – F154	Follow standard procedures; the title "Arts and crafts worker, recreation" is in the alphabetical index. Code F144, which contains the title "Arts and crafts teacher", is incorrect. The description of the group and the main tasks are not suitable.
53	Industry – 921	Industry is in the LOE – standard coding.



4. Answer Key (Concluded)

Person	Assigned Code	Comments
53	Occupation – A221	Follow procedures for the special case "Owner/Proprietor of own business". Owners of restaurants are specifically mentioned.
54	Industry – 964	Industry is in the LOE – standard coding.
54	Occupation – F151	Follow standard procedures; the title "hockey player" is in the alphabetical index.
55	Industry – 271	Industry is in the ORMS version of the LOE. If not found, the "bleaching" response implies the 271 code.
55	Occupation – J113	There are several "bleacher" titles in the alphabetical index. The coder must use industry to choose the correct title, in this case "bleach plant operator , pulp mills". Coders should not choose J142, as persons in this group are assistants or helpers.

## **F. General Review**

Conduct an overall systematic review of the General Coding using all of the flow charts in the M-200 as a base. Your review should not only include the coding actions for each question but also a review of the general method for processing each questionnaire as outlined in Part C on page 2 of the M-200. As well, go over the points addressed in Part D of the M-200 on pages 4 to 8, inclusive.

This is also an opportunity to address any problem areas which your trainees may have encountered during the training program. Encourage questions so that you may clarify any areas which may be unclear or ambiguous to the trainees. (Allow 60 minutes for this review.)

## XI. Training of Sub-operations 2A – Noting and 2C – Adjudication (Quality Control)

### Contents and Time-frames

- A. Introduction – 10 minutes
- B. Noter Duties – 90 minutes
- C. Adjudicator Duties – 180 minutes
- D. General Review – 20 minutes

#### A. Introduction

##### 1. Example text to be spoken:

You have been selected to work in Quality Control which consists of sub-operations 2A – Noting and 2C – Adjudication.

As you will recall, Noting is performed on an EA before it is processed through General Coding. In Noting, the sample of 2B/2C/2D or Form 3 (UR) census questionnaires are processed for an EA as they would be through General Coding with one major exception – you will not make ANY marks on the actual questionnaires. Instead, you will enter all codes on the Noting Form. These forms will be filed after Noting is completed, but will be retrieved during Adjudication.

Adjudication is performed AFTER an EA has been processed through General Coding. The codes on the Noting Forms are compared to the codes which were entered on the sampled questionnaires and any discrepancies are recorded on an Error Listing Form. The adjudicator then determines what the correct code should be and indicates this on the Error Listing Form. An error can be assigned to the Noter or Coder or both. After reviewing all of the sample questionnaires, the Noter and Coder errors are totalled. If the quality of coding by the Coder does not meet the required quality levels, the entire EA is rejected and must be recoded in sub-operation 2B or 2C. All of these procedures are covered in the Economic Coding Quality Control Procedures Manual.

#### B. Noter Duties

##### 1. Example text to be spoken:

We will now begin with the first part of the Quality Control activity – that is, Noting. Please read Chapters I and II of the Economic Coding Quality Control Procedures Manual (M-201) on pages 1 to 10, inclusive. Once you have finished reading these pages, read Chapter I of your Economic Coding Quality Control Training Guide (TM-201) and complete the exercises for Chapter II from pages 3 to 12, inclusive. (Allow 60 minutes and then proceed to the Answer Key shown below.)

2. Answer Key

A. Receipt of the EA box

1. Check that the PROV/FED/EA/VN, Household No. and Questionnaire No. match. Enter Noter No. and Date Noted.
2. Refer to your coordinator because the Household and Questionnaire numbers do not match.

B. Noting Procedures

1. Q. 38 code 458  
Q. 40 code H713
2. Q. 38 code 730  
Q. 40 code B113
3. Q. 38 code 861  
Q. 40 code D112

C. Forwarding the EA Box

1. (a) In the EA box in the correct Household number.
2. (c) In sequence by Household number, separately for Forms 2 and Forms 3.
3. (b) In the proper PROV/FED/EA (PEDEA) file in the filing cabinet.

D. Noting Summary Questions

1. (a) Your coordinator
2. (a) In Operation 1
3. (c) PROV/FED/EA/VN, Household number and Questionnaire number
4. (b) On a separate Noting Form for each sampled questionnaire
5. (c) Enter the letter "R" under the coding box on the Noting Form for that question
6. (c) The Adjudicator

3. Review

Using the flow chart on page 5 of the M-201 as a base, conduct a review of the actions to be performed by the Noter in sub-operation 2A. When conducting your review ensure that you mention the following points:

- Noting is only performed on a sample of the 2B/2C/2D and Form 3 (UR) questionnaires in an EA box. The questionnaires to be sampled will have been selected in Operation 1 before the EA is received in sub-operation 2A
- Noting.
- Noters are never to enter marks or codes on the actual questionnaires. All codes or actions to be taken by the Noter are to be shown on the Noting Form.

- Always ensure that the identification on the Noting Forms matches the identification on the corresponding sample questionnaire (i.e. PROV, FED, EA, VN, Household and Quest. Nos.) (Allow 30 minutes for the Answer Key and review.)

### C. Adjudicator Duties

#### 1. Example text to be spoken:

As the second part of Quality Control, sub-operation 2C – Adjudication involves the comparison of codes assigned by the Noter and the Coder for each of the sample questionnaires. The Adjudicator is required to list any discrepancies between the Noter and Coder on an Error Listing Form. Then, the Adjudicator must attempt to determine the correct code by applying the procedures in the Economic Coding Procedures Manual (M-200). The Adjudicator's code is then entered on the Error Listing Form and errors are charged to either the Noter, the Coder or both. Once the Adjudicator has reviewed all of the sample questionnaires in the EA, the Noter's errors and the Coder's errors are totalled. The Total Industry codes in sample and Total Occupation codes in sample on the Noting Forms are also completed. The Adjudicator refers to the CACS to verify if the EA will be accepted or rejected. If the EA is accepted, it is forwarded to either sub-operation 2D – Referral Coding or Operation 3. If the EA is rejected in first review and it is not a 100% sample, the entire EA will be recoded in sub-operation 2B – General Coding. If the EA is in second review or the EA is a 100% sample, the EA will be recoded by an Adjudicator in sub-operation 2C – Adjudication.

Now please read Chapter III – Adjudicator Duties in the M-201 on pages 11 to 33, inclusive. Then complete the exercises in Chapter III of the TM-201 on pages 13 to 43. (Allow up to 2 1/2 hours and then review the exercises using the Answer Key below.)

2. Answer Key

## A. Receipt of the EA Box and Completion of the Error Listing Form



1996 Census of Canada  
Regional Processing  
Sub-operation - Adjudication

### Economic Coding - Error Listing Form

Recensement du Canada de 1996  
Dépouillement régional  
Sous-opération - Arbitrage

### Codage des variables économiques - Formule de listage des erreurs

Form R-216  
Formule

Page \_\_\_ of \_\_\_  
de

PROV	FED CÉF	EA SD	VN NV
35	008	270	7

100% Sample 100 % Échantillon	<input type="checkbox"/>	Noter No. N° du noteur	443	Date noted Date de notation	09/06
Review No. N° de révision	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2	Coder No. N° du codeur	477	Date coded Date du codage	09/14
		Adjudicator No. N° de l'arbitre	414	Date adjudicated Date de l'arbitrage	09/30



2. Answer Key, Continued

C. Completion of Review

Exercise 1 – page 26

"Total errors for this page"

1. Noter Industry = 4
2. Noter Occupation = 5
3. Coder Industry = 3
4. Coder Occupation = 6

"Cumulative Total Errors"

1. Noter Industry = 4
2. Noter Occupation = 5
3. Coder Industry = 3
4. Coder Occupation = 6

Exercise 1 – page 27

"Total errors for this page"

1. Noter Industry = 1
2. Noter Occupation = 1
3. Coder Industry = 1
4. Coder Occupation = 2

"Cumulative Total Errors"

1. Noter Industry = 5
2. Noter Occupation = 6
3. Coder Industry = 4
4. Coder Occupation = 8

Exercise 2

- (a) Total Industry codes in questionnaire = 4  
Total Occupation codes in questionnaire = 4
- (b) Total Industry codes in questionnaire = 2  
Total Occupation codes in questionnaire = 2
- (c) Total Industry codes in questionnaire = 3  
Total Occupation codes in questionnaire = 3
- (d) Total Industry codes in questionnaire = 1  
Total Occupation codes in questionnaire = 1



2. Answer Key, Continued

Exercise 3

Total Industry codes in sample = 10

Total Occupation codes in sample = 10

D. Acceptance/Rejection of EA

1. Total Noter Errors for Industry = 4  
Total Noter Errors for Occupation = 7  
Total Coder Errors for Industry = 3  
Total Coder Errors for Occupation = 6  
Total Codes in Sample for Industry = 26  
Total Codes in Sample for Occupation = 26
2. Rejected in second review.
3. In the EA decision box, enter a mark in the Rejected box.
4. In the EA decision box, enter a mark in the Accepted box.

E. Referral Procedures

1. Cannot be determined. To determine whether or not there are any Referrals for this EA, it would be necessary to check if there are any Referrals in the non-sampled questionnaires.
2. Yes.
3.
  - a) Correct the code on the questionnaire and delete the entry from the Referral Form.
  - b) Proceed to the next person on the Error Listing Form.
  - c) Ensure that the EA is forwarded to sub-operation 2D – Referral Coding and proceed to the next person on the Error Listing Form.
  - d) Correct the code on the questionnaire and proceed to the next person on the Error Listing Form.
  - e) Complete an entry for this question on the Referral Form. If it is the first entry, attach a Referral Label to the EA box.

F. Forwarding the EA Box

1.
  - (i) Check mark the "Accepted" box on the Error Listing Form.
  - (ii) Correct all of the Coder errors for Questions 38 and 40. Where there is an "X" in the "Coder error" column of the Error Listing Form, erase the code on the questionnaire and assign your code from the Error Listing Form to that question.
  - (iii) Remove and destroy the Reject Label from the side of the EA box if there is one present.
  - (iv) Place the Noting Forms and Error Listing Forms in an envelope and place the envelope inside the EA box.

2. Answer Key, Continued

- (v) If there are existing (i.e., uncanceled) entries on a Referral Form and/or referrals by the Adjudicator on the Error Listing Form, follow the Referral Procedures on page 25 of the M-201.
  - (vi) Proceed to Part D – Forwarding the EA Box on page 30 of the M-201.
2. (i) Check mark the "Rejected" box on the Error Listing Form.
- (ii) Attach a Reject Label to the side of the EA box.
- (iii) Put the Noting Forms and Error Listing Forms in the appropriate PEDEA file in the filing cabinet.
- (iv) Replace the sampled questionnaires in the EA box by real EA number and by the correct household number.
- (v) If a Referral Form was used by the Coder, put a large "X" over the entire Referral Form and place it in the appropriate PEDEA file in the filing cabinet. Remove and destroy the Referral Label.
- (vi) Return the EA to your coordinator who will forward the EA to sub-operation 2B – General Coding.
3. (i) Mark the "Rejected" box on the Error Listing Form. **Do not** affix a Reject Label to the side of the EA box.
- (ii) Correct all Coder errors for Questions 38 and 40 in the sampled questionnaires. If there is an "X" in the "Coder error" column of the Error Listing Form, erase the code on the questionnaire and assign the Adjudicator code to that question.
- (iii) Place the Noting Forms and Error Listing Forms in an envelope and place the envelope inside the EA box.
- (iv) If there are existing (i.e., uncanceled) entries on a Referral Form and/or referrals by the Adjudicator on the Error Listing Form, follow the Referral Procedures on page 25 of the M-201
- (v) Proceed to Part D – Forwarding the EA Box on page 30 of the M-201
4. (i) Check mark the "Rejected" box on the Error Listing Form.
- (ii) Put the Noting Forms and Error Listing Forms in the appropriate PEDEA file in the filing cabinet.

2. Answer Key, Concluded

- (iii) If a Referral Form was used by the Coder, put a large "X" over the entire Referral Form and place it in the appropriate PEDEA file in the filing cabinet. Remove and destroy the Referral Label.
- (iv) Forward the EA box to your coordinator who will assign the EA to another Adjudicator for recoding.

G. Summary Questions – Adjudication

- 1. (a) The number in the "codes in questionnaire" boxes of all Noting Forms.
- 2. (c) Correct all Coder errors in the sample questionnaires.
- 3. (c) When the box is rejected under first review and it is not a 100% sample.
- 4. (a) Yes
- 5. (b) Both codes are the same or both referred the question or neither assigned a code.
- 6. Adjudicator Action column
  - (1) J
  - (2) X
  - (3) X
  - (4) X
  - (5) No action
  - (6) X
  - (7) X
  - (8) X

3. Review

Using the flow chart on page 11 of the M-201 manual as a base, conduct a review of the Adjudicator duties in sub-operation 2C. During your review, ensure that the following points are mentioned:

- Adjudication is only done for the sample questionnaires in an EA box.
- Only those questions which have discrepancies between the Noter's and Coder's actions are to be listed on the Error Listing Form.
- For all EAs which are **accepted**, the Adjudicator must ensure that all Coder errors are corrected before the EA box leaves sub-operation 2C – Adjudication.
- For 100% EAs which are rejected, the Adjudicator must ensure that all Coder errors are corrected on all questionnaires before the EA box leaves sub-operation 2C.

- For first review EAs which are rejected, corrections to the sample questionnaires should not be made by the Adjudicator since the EA will be returned to sub-operation 2B for complete recoding. A Reject Label must be attached to the EA box. (Allow 30 minutes for the Answer Key and review.)
- For EAs which fail second review, the coordinator will assign the EA box to be completely recoded by an Adjudicator and the procedures in Appendix B of the M-201 manual must be followed.

#### **D. General Review**

Conduct a general review of all of the activities associated with Noting and Adjudication. The flow charts on pages 2, 5 and 11 of the M-201 manual should be used as a base for this review. Also address/clarify any points which arose during the training session which appeared to be unclear or confusing to the trainees. (Allow 40 minutes.)

## XII. Training of Sub-operation 2D – Referral Coding

### Contents and Time Frames

- A. Introduction – 10 minutes
- B. Referral Coding – 120 minutes
- C. General Review – 15 minutes

#### A. Introduction

##### 1. Example text to be spoken:

You have been selected to work in sub-operation 2D – Referral Coding. As you remember from your General Coding training, there are cases when the Coders in sub-operation 2B – General Coding must refer questions to Referral Coding because:

- they are unable to code a question; or
- specific instructions in the Economic Coding Procedure Manual instruct the Coder to refer certain situations.

Such questions are identified by the Coders on the Referral Form. These forms are placed inside the EA box. Once an EA has been accepted in Quality Control, it is sent to sub-operation 2D if one or more questions were referred. Only Questions 38 and 40 can be sent to Referral Coding. In sub-operation 2D, you will be required to identify the appropriate code for each referred question, and must enter this code on the questionnaire and complete the Referral Form.

As Referral Coders you will have additional reference materials at your disposal that are used to determine the appropriate code to be assigned.

You also have a Coding Consultant who is specially trained to handle all questions that you or your coordinator cannot resolve.

Referral Coding is often described as detective work since in many cases there are no concrete procedures for resolving a referred item.

For the majority of responses, after you have tried to code the response with the general coding procedures, you will begin your research with one of the reference materials and continue searching through several other sources until you have enough information to identify the appropriate code which should be entered on the questionnaire.

Referral Coding can be an interesting, challenging and stimulating type of work.

## B. Referral Coding

### 1. Example text to be spoken:

**Now, please take your Referral Coding Procedure Manual (M-203) and read Chapters I and II on pages 1 to 4 inclusive.**

Once the trainees have read these two chapters, allow 20 minutes for them to study the reference materials that you have in your reference area.

**Now, please complete the exercises on page 3 of the Referral Coding Training Guide (TM-203), using the information contained in Chapter II of the M-203.**

(Allow 15 minutes and then discuss the exercise using the Answer Key shown below.)

### 2. Answer Key

1. True
2. True
3. False
4. True
5. False
6. False

### 3. Example text to be spoken:

**Now that you are familiar with the reference materials, please read Chapter III – Coding of Referred Questions in the M-203 on pages 5 to 8 inclusive. Once you have read these procedures, turn to the TM-203 and complete the exercises on pages 5 to 6.**

Allow 20 minutes and then discuss the exercises using the Answer Key shown below.

### 4. Answer Key

#### A. Receipt of Enumeration Area (EA) box from Sub-operation 2C - Adjudication

Locate all Referral Forms which have been completed for this EA.

If a Referral Form indicates that more than one form was completed for this EA, (e.g., page 1 of 2, page 2 of 2), ensure all Referral Forms are in the box. If any Referral Forms are missing, consult your Coordinator.

Ensure that the Coder No., date and PROV, FED, EA, VN numbers have been entered on the Referral Form and that the PROV, FED, EA, VN numbers correspond with those on the EA box. If the numbers do not correspond, consult your Coordinator.

4. Answer Key, Concluded

Enter your clerk number and the date on all referral forms in the space entitled Referral Clerk No. and Date.

B. General Instructions for Referral Coding

- 1.(a) Take the first Referral Form and ensure the document type, household no., questionnaire no., person no. and question no. have been completed by the Coder or Adjudicator.

Locate the Form 2B/2C/2D or the Form 3 that corresponds to the first referred question listed on the Referral Form.

Apply the procedures from the economic Coding Procedures Manual (M-200) for the referred question.

- 1.(b) Enter the code in black lead pencil in the appropriate code box on the Form 2B/2C/2D or Form 3 questionnaire.

Record the code of the Referral Form in the column entitled "Referral code".

Enter a check mark in the column entitled "Over-referral".

Proceed to the next referred question.

- 1.(c) Turn to Part C - Specific Instructions for Referral Coding to determine whether any of the situations apply.

If Part C - Specific Instructions for Referral Coding does not apply, search through the additional reference materials to find the information required to code the referred question.

Once the correct code is found, enter the code in the appropriate code box on the Form 2B/2C/2D or the Form 3.

Record the code on the Referral Form in the column entitled "Referral code".

Do not make an entry in the column entitled "Over-referral".

Proceed to the next referred question.

- 2.(a) Document type, Household No., Questionnaire No., Person No., Question No.

(b)

Over-referral  
questionnaire, Referral Form

(c)

Consultant

(d)

applying the sub-operation 2B General Coding procedures and is not a case covered in the Specific Instructions for Referral Coding.

(e)

5. Example text to be spoken:

Student/trainee cases are perhaps the most difficult of the identification of whom to code exception cases to resolve. Some points to note:

- For student/trainee referral cases, the referral coder must rely upon income received in 1995 responses to judge if the respondent worked at any time since January 1, 1995.
- There is evidence of work (since January 1, 1995) if there is any income in Question 47(a), (b), or (c).
- If the income reported in Question 47(a) appears to be a training allowance, however, the referral coder should refer the case to the Coding Consultant.

The Coding Consultant may be able to obtain additional information on the specific student/trainee programs reported by the respondent, including what amounts of income should be considered a training allowance.

A training allowance might also be reported in Question 47(g). If the Coding Consultant determines that the income reported in Question 47(a) or (g) is a training allowance only, he or she will assign code 004 in Question 38 and leave Question 40 blank.

**Now please read the Specific Instructions for Referral - Referral Procedures for Students and Trainees on pages 8 to 11 in the M-203 and complete the six exercises on pages 7 to 12 in the TM-203. (Allow 55 minutes and then discuss the exercises using the Answer Key shown below.)**

6. Answer Key

1. Responses to questions 37-40 refer solely to student/trainee activities. The respondent's income reported in question 47(a) was a training allowance. There is no other evidence of work since January 1, 1995. This person probably misinterpreted the intention of the census labour questions and gave incorrect responses to questions 31-46.

Refer this case to the Coding Consultant. Proceed to the next case. (The Coding Consultant will assign Code 004 in Question 38 and leave Question 40 blank.)

2. Responses to questions 37-40 refer solely to student/trainee activities. Given the responses provided by the respondent to questions 37-40, the income reported in question 47(a) is likely a training allowance. There is no other evidence of work since January 1, 1995. (Questions 36-46 were answered incorrectly.)

Refer this case to the Coding Consultant. Proceed to the next referral case. (If the Coding Consultant determines that the income reported in Question 47(a) is a training allowance, he/she will assign Code 004 in Question 38 and leave Question 40 blank.)



6. Answer Key, Concluded

3. The income reported in question 47(a) does not appear to be a training allowance but income earned from another job held at some time since January 1, 1995. (There is evidence of work done at some other job at some time since January 1, 1995.)

Assign code 000 in question 38 and X000 in question 40 since no information was provided in questions 37-40 for the job for which the income was reported. Proceed to the next referral case.

4. The income reported in question 47(a) is probably not a training allowance but wages and salaries earned by the respondent in exchange for services rendered to the Canadian Coast Guard. Because of the added information that such persons are sworn into the Canadian Public Service, in this situation the respondent's responses to Questions 37 to 40 refer to "paid work" (or non-student/trainee activities).

Proceed to the M-200 procedures manual and complete Industry and Occupation coding for this person. Assign code 455 for Industry and code C174 for Occupation.

5. Student nurses are always considered to be students/trainees only. There is also no other evidence of work since January 1, 1995. (Questions 31-46 were answered incorrectly.)

Assign code 004 in Question 38 and leave Question 40 blank. Proceed to the next referral case.

6. Interns should always be coded.

Proceed to the Economic Coding Procedures Manual (M-200) and complete Industry and Occupation coding for this person. Assign code 861 for Industry and code D012 for Occupation.

The title "intern" appears in the Occupation Coding Manual. This case could have been handled in general coding, and an over-referral could be charged.

7. **Now please read the Specific Instructions for Referral - Referral Coding of Industry and Occupation Questions 37-40 on pages 12 to 15 in the M-203 and complete the exercises on page 13 of the TM-203.**

(Allow approximately 15 minutes and then discuss the exercises using the Answer Key shown on page 74.)

8. Answer Key

1. True
2. False
3. False
4. True
5. False
6. False

9. Now please read the Completion of Coding in Sub-operation 2D - Referral Coding on page 16 in the M-203 and complete the exercises on page 14 in the TM-203.

(Allow approximately 15 minutes and then discuss the exercises using the Answer Key shown below.)

10. Answer Key

1. Total number of Industry codes referred for this page; Total number of Occupation codes referred for this page
2. total this page; total previous pages
3. Total number of Industry codes referred; total number of Occupation codes referred; cumulative total number of codes referred; Industry; Occupation
4. questionnaires; EA box; sequential
5. EA box; completed Referral Forms; coordinator

11. Example text to be spoken:

At this point, it would be useful to go over some of the exercises that the coders would have looked at in their general coding training.

I'd like to go back to the practice exercises that were referred when you completed your general coding training using the TM-200. We can see what referral actions should be taken to resolve these cases.

**Exercise 4 – Page 31**

**Industry:** In the absence of any other information (e.g., comments by respondents, information from other respondents in the household or EA), select code 851 – this is the most common code to be used for schooling.

**Occupation:** Since there is really nothing to check in the reference manuals (e.g., no school name) the code E130 should be used as outlined in the Referral procedures on page 15.

**Exercise 5 – Page 44**

**Industry:** The Referral Coder should use reference materials available (e.g., telephone yellow pages, city directories). It is quite possible that one of these sources could tell what type of construction is done by this company. If nothing is found, enter code 400 as outlined on page 14 of the Referral procedures manual.

**Exercise 17 – Page 56**

**Industry:** This is a complicated Referral case for a Referral that is very close to being assigned code 182. The first thing to be checked is if the respondent's place of residence is near Long Sault. If it is anywhere close (i.e. 100 miles), take this code. If not, check for further information in the household or EA (e.g., often two members of the same household work for the same firm). After that, check the telephone book yellow pages (if available). As a last resort, pass the case on to the Coding Consultant so that he or she can check in Dun and Bradstreet to see if there are any locations from this reference document near the respondent's residence that could be appropriate. If, after searching, a better code is not found, take code 182.

**Occupation:** Whatever Industry title is selected decides the Occupation. If the Industry is 182, then the Occupation should be J016; if the Industry is 243, then the Occupation should be J025.

**Exercise 33 – Page 72**

**Occupation:** Check the city directories to see if there is any further information on the respondent's Occupation. If no information is available, then choose J162 (which covers leather as well as some other composite materials).

**Exercise 47 – Page 86**

**Industry:** There are a number of things that the Referral coder could check. For example, by checking the age, you could get a better picture of the respondent. If he or she is 15-19 years old, it is more likely that the respondent is a casual neighbourhood babysitter (code 979). An older individual (i.e. 30-50 years of age) could be accepting a number of children into his or her home (code 864). In addition, the income reported in Questions 47 (a),(b) or (c) could also be helpful in deciding if this is a small or large operation.

None of these things are conclusive, but they can lead to taking a decision one way or the other.

### C. General Review

Conduct a general review of Referral Coding, using the flow chart on page 4 of the M-203 as a base. Ensure that the following points are mentioned during your review:

- Only Questions 38 and 40 should be sent to Referral Coding.
- In most cases, Referral Coding is unstructured investigative work; however, there are some specific instructions which must be followed for the coding of some Industry and Occupation referrals.
- Referral coders must always begin the coding of each referred item by following the procedures in the M-200. In this way, if a question could be coded using only the sub-operation 2B procedures, it can be identified as an "Over-referral".
- Ensure that all required information is recorded both on the questionnaire and the Referral Form.

Allow 15 minutes for the general review of Referral Coding.

STATISTICS CANADA LIBRARY  
BIBLIOTHEQUE STATISTIQUE CANADA



1010214068



